

2011 Practice Management Annual Conference Agenda

THURSDAY A.M.	Business Partner Track	Time Matters® Essentials	Time Matters® Power User	PCLaw® Essentials	PCLaw® Power User	Juris® Essentials	Juris® Power User
7:30 – 8:30	Continental Breakfast/LEXPO						
8:30 – 9:30	Welcome Presentation—“How LexisNexis® is Leveraging Technology Advancements to Improve the Practice of Law”						
9:30 – 10:15	Key Note: Special Guest Speaker						
10:30 – 11:00		Time Matters® Product Update		PCLaw® Product Update		Juris® Product Update	
11:10 – 12:10	Developing a Social Media Strategy that Drives Business Results	Mobility & Remote Access for Time Matters	Advanced Firm Administration: System Settings and Configuration	Essentials of Billing in PCLaw	Troubleshooting Tips: Best Practices for Modifying and Correcting Billing Entries in PCLaw Software	Get to Know the Top Ten Reports and Top Critical Analysis Reports	Avoid eBilling Rejections and Tackle Complex Billing Requirements
THURSDAY P.M.							
12:20 – 1:20	Lunch/LEXPO						
1:30 – 2:30	Effectively Managing Cash Flow: Learn the Five Drivers that Effect Cash Flow and Profitability	Time Matters: Labels, Lists and Exporting	Automating Firm Workflows: Using Chains and Triggers	Mobility & Remote Access for PCLaw	Mastering the Trust Account	Managing Matters from Intake to Close	Advanced Budgeting
2:40 – 3:40	Developing and Implementing an Effective Marketing Strategy	Best Practices for Calendaring and Docketing	Linking Time Matters with Other Products: QuickBooks®, Timeslips®, PCLaw	Workflow Essentials: Managing Matters, Time and Expenses	Using Alternative Fee Arrangements in PCLaw	Managing Your Conflict Data and Conflict Search Tips	Become an Expert: Advanced/Custom Reporting
3:40 – 4:00	Break/LEXPO						
4:00 – 5:00	Minimizing Risk: Avoid Clerical Errors and Keep Malpractice at Bay	Essentials of Document Management	Customizing and Creating Reports to Fit Your Business Needs	Best Practices of Bank Reconciliation in PCLaw	Mastering PCLaw Accounting	Developing a Collections Strategy	Troubleshooting Tips for Capturing More Billable Time and Establishing Flexible Billing Agreements/ Alternate Fee Arrangements
6:00 – 9:00	Customer Appreciation Event: Luau Party						
FRIDAY A.M.							
7:15 – 8:30	Continental Breakfast/LEXPO						
8:30 – 9:30	Billing Strategies and Trends in the Legal Industry	Best Practices for Setting Up the Firm Network and System Upgrades	Advanced Document Management: Indexes, Searching and Advanced Template Creation	Understanding the PCLaw Template Editor	Advanced Reporting: Understanding the Firm's Financial Statements	Ten Principals for More Effective Billing	Take Control of Work in Process
9:40 – 10:40	Passing the Torch: Successful Succession Plan Development	Time Matters: Entering Time and Expense	How to Manage the Health of Your Network: When is the Last Time Your Network Had a Checkup?	Administering System & User Settings in PCLaw	Troubleshooting Tips: Best Practices for Modifying & Correcting Accounting Entries in PCLaw	Introduction to Dashboards	Take Control of Advanced Client Costs
10:40 – 11:00	Break/LEXPO						
11:00 – 12:00	Managing Your Tech Budget Effectively, Whether You Spend \$5K or \$30K	Best Practices for E-mail and Communication Using Time Matters	Customizing Time Matters	PCLaw Office Efficiency Tools: Calendaring, Phone Call and Document Management	PCLaw Closing Month and Year End	Secrets of Expense Schedules and Cross References in Juris	Become an Accounts Receivable Hero
FRIDAY P.M.							
12:00 – 1:15	Lunch/LEXPO/Regional JUIG Luncheon (optional)						
1:15 – 2:15	Keys to a Paperless Office	Session 8: Time Matters Tips and Tricks		Session 8: PCLaw Tips and Tricks		Session 8: Juris Software Tips and Tricks	
2:15 – 3:15	Put Your Firm Ahead of the Curve: How to Leverage the Latest Technologies					Session 9: Topic Café	
3:15 – 3:30	General Session: Prize Drawing						

Session Descriptions: Business Partner Track, Time Matters Essentials, Time Matters Power User

Business Partner Track	Description	Speaker
Developing a Social Media Strategy that Drives Business Results	In this session, learn the practical steps to: assess your current situation; evaluate the different types of social media; how to develop a plan to get started; and how to measure success.	LexisNexis Community Management Group/ Loretta Ruppert
Effectively Managing Cash Flow: Learn the Five Drivers that Effect Cash Flow and Profitability	The five key drivers to profitability are not new—David Maister, an ex-professor from Harvard authored a book defining the law firm business model.	Kelly Jones/ Loretta Ruppert
Developing and Implementing an Effective Marketing Strategy	The Internet has added opportunity and complexities in how law firms market their firm. Learn the top 5 Dos and Don'ts for developing and implementing an effective marketing strategy.	Lexis® Web Marketing Group
Minimizing Risk: Avoid Clerical Errors and Keep Malpractice at Bay	Accurate trust accounting is critical for firms that hold funds on behalf of clients. Ease the angst that comes with being in compliance with trust accounting regulations. Attend this Webinar to learn the best practices in trust accounting compliance to include: written policies and procedures; reporting requirements; disbursing of unused funds; fee agreements; and technology.	Natalie Kelly, PMA Georgia State Bar Association
Billing Strategies and Trends in the Legal Industry	Hear from an industry expert who can share what corporations and institutions are doing.	Thomas Strouse
Passing the Torch: Successful Succession Plan Development	Do you have enough money to retire? Does your law firm have a succession plan? In this session, succession planning will be defined, assessing expectations and reality, how law firms are valued, and understanding when to start, how to engage with experienced resources, and more importantly how to execute the plan.	Fran Molinari, CPA
Managing Your Tech Budget Effectively: Whether You Spend \$5K or \$30K	Whether you have a budget of \$5K or \$30K there are essential steps you should take when developing your IT budget. In this session, you will hear from a Legal Technologist to understand what you need to consider when assessing and prioritizing where and how to spend your technology budget.	Craig Bayer
Keys to a Paperless Office	Hear from your peers on the best practices for going paperless. What are the challenges, how do you overcome them, what are the biggest benefits and what would you do differently?	Small panel
Put Your Firm Ahead of the Curve: How to Leverage the Latest Technologies	Learn what some of the latest gadgets, services and technology law firms are using to make their lives easier when running the business, practicing law or for their personal lives.	Small panel

Time Matters Essentials	Description	Speaker
Mobility & Remote Access for Time Matters	The new Time Matters Mobility service available with v11.0 allows you to view and update basic matter information, find client contacts, and enter billable time and expenses from Web-based smartphones and other mobile devices. In this session learn all the tips about using the new mobility features, as well as learning how to sync your laptop for remote access.	Mark Deal
Time Matters: Labels, Lists and Exporting	Learn best practices to export data out of Time Matters software to create lists, mailing labels and exporting data for use in other software applications. This session is a must for learning how to maximize Time Matters tools to increase efficiency in your firm.	Duane Cary
Best Practices for Calendaring and Docketing	Learn how to use the Time Matters powerful features of the Calendar to automate workflow and ensure critical due dates are not missed, and manage events and To Do's activities back to relevant contacts and matters.	Duane Cary
Essentials of Document Management	Creating and managing documents efficiently in Time Matters software, with as few steps as possible, increases your productivity and saves time. Learn best practices for document storage and retrieval, forms and various ways to save e-mails and attachments in Time Matters.	Duane Cary
Best Practices for Setting Up the Firm Network and System Upgrades	Understand the basic framework required for a successful network, learn about the top Dos and Don'ts to include a checklist of what to do before upgrading your system.	Bill Dertinger
Time Matters: Entering Time and Expense	Learn the options for entering time and expenses within Time Matters. In this session, you will learn how to set up Time Matters for billing, as well as best practices for efficiently entering your time and expenses. You will also have the opportunity to walk thru a simple invoice creation.	Duane Cary
Best Practices for E-mail and Communications Using Time Matters	Electronic mail is a great communication tool, but it presents new organizational challenges. Learn to organize your e-mails, efficiently manage your inbox, and handle e-mail attachments using Time Matters tools.	Duane Cary

Time Matters Power User	Description	Speaker
Advanced Firm Administration: System Settings and Configuration	In this advanced session, learn best practices for distinguishing program-level, user-level, and workstation-level settings and the advantages of each. Learn optimal processes for where and how to set up system security. Critical tasks to perform for firm, backup, restore and use of database utilities will be discussed to ensure the integrity of Time Matters data.	Jeff Krause
Automating Firm Workflows: Using Chains and Triggers	Time Matters has advanced productivity tools that help you automate processes based on the business rules you develop to ensure employees of the firm are following the protocol needed to get the job done in an accurate and efficient manner. Learn how a chain template and triggers can help you streamline many tasks performed in the office.	Andrea Giltner
Linking Time Matters with Other Products: QuickBooks, Timeslips, PCLaw	One of the benefits of using Time Matters software is its high flexibility on linking to many of the industry's leading billing and accounting software products. In this session, you will learn more details about the links with QuickBooks, Timeslips and PCLaw to include what information is actually linked, how it works and how to get started.	Andrea Giltner

Session Descriptions: Time Matters Power User, Essentials of PCLaw, PCLaw Power User

Time Matters Power User	Description	Speaker
Customizing and Creating Reports to Fit Your Business Needs	Time Matters software can capture massive amounts of information for your clients, matters and associated activities. Find out how the built-in Time Matters custom Report Designer can turn this information into meaningful reports. We will walk thru best practices for accessing and using the Report Designer.	Kelly Jones
Advanced Document Management: Indexes, Searching and Advanced Template Creation	Time spent searching for documents is unnecessary if you have Time Matters. Learn to corral your documents into an enterprise repository by using Time Matters document management features. In this session, learn how to properly store documents so they may be retrieved quickly and efficiently.	Mark Deal
How to Manage the Health of Your Network: When is the Last Time Your Network Had a Checkup?	Just like a vehicle with 100,000 miles, it is essential to develop an ongoing maintenance plan for your law firm's network. The mistake many law firms make when it comes to their firm's technology infrastructure is to "set it and forget it." Learn best practices for methods to stay on top of your network's health.	Bill Dertinger
Customizing Time Matters	Learn tips for customizing Time Matters for your firm. We will discuss form customization, classification code options and screen layouts in order to maximize Time Matters software for your firm.	Jeff Krause

Essentials of PCLaw	Description	Speaker
Essentials of Billing in PCLaw	Learn the essential workflow billing steps in PCLaw software. In this session learn how to create pre-bills, make edits and then produce your final bill output.	Patrick Torney
Mobility & Remote Access for PCLaw	Most law firms need to access their firm's client privileged information while out of the office, whether working from home, a remote office or traveling. Learn about what alternatives you have with the PCLaw solution to include the Satellite office or PCLaw Mobility.	Craig Bayer
Workflow Essentials: Managing Matters, Time and Expenses	Don't record your time on notepads and Post-it® notes: learn how to use the PCLaw data-entry tools so billable time doesn't slip through the cracks.	Patty Davidson
Best Practices of Bank Reconciliation in PCLaw	Learn effective troubleshooting tips for modifying and correcting accounting entries in PCLaw. Learn best practices to identify and resolve General Ledger reconciliation issues and incorrect General Ledger adjustments. Additionally, the session will review tips for changing General Ledger account types as well as other helpful reports to use for reconciliation purposes.	Patrick Torney
Understanding the PCLaw Template Editor	Need to modify your billing template? Having one bill style may not work for all of your clients. In this session learn best practices for working with the PCLaw template editor to create and modify bill layouts as well as assigning billing templates to specific matters.	Nancy Griffin
Administering System & User Settings in PCLaw	Knowing how and when to administer system and user settings in PCLaw software is critical for system performance. In this session, learn best practices for distinguishing user-level and system-level settings, and the advantages of each. Learn optimal processes for where and how to set up system security. Critical tasks to perform for firm, backup and restore will be discussed to ensure the integrity of PCLaw data.	Cindy Emmerson
PCLaw Office Efficiency Tools: Calendaring, Phone Call and Document Management	Stop chasing messages, memos and briefs. Discover the great tools available in PCLaw software that will help you manage your office so you can spend more time managing your clients.	Deborah Schafer

PCLaw Power User	Description	Speaker
Troubleshooting Tips: Best Practices for Modifying and Correcting Billing Entries in PCLaw Software	Learn effective troubleshooting tips for modifying and correcting billing entries in PCLaw. Learn to identify and resolve inconsistencies in matter balances and learn how to use key billing reports to easily identify issues. Additionally, the session will review the use of the reset matter function as well as mass billing techniques.	Steve Best
Mastering the Trust Account	Are you troubled with your Trust Account? Is it in balance? Do you find yourself tracking down entries and trying to figure out how and why they hit your account? In this session we will follow an in-depth workflow of how entries hit your trust account, balancing tips and steps to maintain accuracy of the account going forward.	Patrick Torney
Using Alternative Fee Arrangements in PCLaw	Need to modify billing arrangements? In this session we will cover the various billing options available in PCLaw from flat-fee and contingency billing to handling discounts. Additionally we will review matter billing setup and task-based billing.	Cindy Emmerson
Mastering PCLaw Accounting	In this session, master your understanding of accounting in PCLaw. Learn about the different accounting methods and how client costs are handled in each. Understand the impacts of data entry and reporting on the financial records for client costs, write downs, Accounts Payable and Accounts Receivable. Maximize your time working with your accountants using the PCLaw data and tips for running helpful reports.	Deborah Schafer
Advanced Reporting: Understanding the Firm's Financial Statements	In this session, we will review the four basic financial reports (General Ledger, Trial Balance, Income Statement and Balance Sheet) and how they work with one another. We'll discuss how to interpret the reports and explain them to partners and accountants. Further, we'll review multiple output functionality, departmentalization, use of GL cost centers and categories, as well as reconciling balances in your client disbursement recovery account.	Steve Best
Troubleshooting Tips: Best Practices for Modifying & Correcting Accounting Entries in PCLaw	Learn effective troubleshooting tips for modifying and correcting accounting entries in PCLaw software. Learn best practices to identify and resolve General Ledger reconciliation issues and incorrect General Ledger adjustments. Additionally, the session will review tips for changing General Ledger account types as well as other helpful reports to use for reconciliation purposes.	Nancy Griffin
PCLaw Closing Month and Year End	Learn how to make your month- and year-end processes as seamless as possible. In this session, learn best practices for closing your month and year. Learn steps to perform to close your month and year, reconciling your General Ledger and printing Year-End Reports.	Patty Davidson

Session Descriptions: Juris Essentials, Juris Power User

Juris Essentials	Description	Speaker
Get to Know the Top Ten Reports and Top Critical Analysis Reports	In this session, get an introduction to the top ten most popular reports in Juris and Juris Suite. In addition, get to know the most popular reports of all, Analysis reports, and learn how to interpret them.	Celeste Bradford
Managing Matters from Intake to Close	This session offers a high-level walkthrough of the life of a matter from performing a conflict search, entering the matter details into the system, tracking work performed, billing that work, collecting or writing off the receivable and closing the matter.	Scott Winter
Managing Your Conflict Data and Conflict Search Tips	Take a deep dive into the conflict search function and learn best practices for performing and managing searches and tips and tricks for running better searches. Need to understand search criteria and how they work? This is your session! Remember, search criteria work the same in Juris and Juris Suite so don't get up when the screen changes.	Kathy Baker
Developing a Collections Strategy	Increasing rates in Juris is easy if you know the process. Watch as a Juris expert walks through the process of increasing rates for Juris matters.	Scott Winter
Ten Principals for More Effective Billing	In this session, 10 principles for more effective billing are introduced that cover changes you can make in Client/Matter setup, Selection, Edit, Bill Designer and more that can make your billing process more effective.	Scott Winter
Introduction to Dashboards	See how to implement a dashboard or alert in Juris Suite. This session includes information on establishing appropriate permissions to the components to assure proper access.	Joel Eaton
Secrets of Expense Schedules and Cross References in Juris	Learn best practices of how effective use of Expense Schedules and Expense Cross Reference Schedules can simplify complex expense agreement requirements.	Kathy Baker

Juris Power User	Description	Speaker
Avoid eBilling Rejections and Tackle Complex Billing Requirements	In this advanced session learn how to establish rules to assure time and expense entries are in compliance with firm policies and client fee agreements. Come to this session with your specific compliance challenges and be prepared for an interactive discussion with the facilitator and peers to define appropriate solutions.	David Caiati
Advanced Budgeting	Experience the power that dynamic budgeting can have on your business. Find out how to create and maintain budgets for Clients, Timekeepers and General Ledger accounts, and learn how these tools can help you to stay in control of your firm.	Celeste Bradford
Become an Expert: Advanced/Custom Reporting	Get answers to some of your most common questions about writing custom reports in Juris Suite and benefit from reporting tips and tricks provided by an experienced Juris support technician and report writer.	Joel Eaton
Troubleshooting Tips for Capturing More Billable Time and Establishing Flexible Billing Agreements/ Alternate Fee Arrangements	Quick tips and tricks for capturing more billable time will be illustrated in this session. In addition, learn how to establish flexible billing agreements.	Scott Winter
Take Control of Work in Process	Work in Process looks good on your Daily Time Summary, but it looks better on your bank statement! Find out how to get it there faster.	Celeste Bradford
Take Control of Client Costs	Mismanagement of Client Advances can damage your firm like a slow leak can damage a home: quietly and with the potential for causing costly damage. Come to this session for practical tips and processes for maintaining control of advances and recovering more of your firm's hard costs.	Kathy Baker
Become an Accounts Receivable Hero	Learn tips for taking control of Accounts Receivable using tools available in Juris and Juris Suite, and get an introduction to the new Collections module to achieve results without requiring heroic effort.	Celeste Bradford